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Air Fares, Canadian Air Carriers, Level I

2017

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Air Fares, Canadian Air Carriers, Level I, 2017

Highlights

- Base air fares in Canada, domestic and international combined, averaged $232.50 in 2017, up 2.0% from 2016, reversing the downward trend of the previous three years. Base air fares do not include taxes and user fees. This increase was a result of year-over-year advances in the last three quarters, with the most notable growth occurring in the second quarter (+ 6.3%).
- The average domestic fare edged up 0.5% from the previous year to $168.30, while the average international fare rose 2.5% to $299.10. The growth in the international sector marked the first increase since 2013.
- In 2017, 98.3% of passengers on domestic and international scheduled flights flew on discount fares, remaining at the 2016 level. The proportion of domestic passengers on discount fares was 98.0%, down 0.3 percentage points from 98.3% the previous year. On international flights, the share of passengers flying on discount fares increased 0.3 percentage points to 98.6%.
- In terms of passenger-kilometres, the proportion of domestic discount travel posted a slight decrease from 2016 to 98.1%. The share of international discount travel increased 0.3 percentage points from the previous year to 99.0% in 2017.
- In 2017, of the 10 selected cities where passengers boarded the plane (enplanement), Saskatoon (+4.0%), Ottawa (+3.7%) and Calgary (+2.6%) recorded the largest increases in average domestic air fares. Halifax (-1.1%) and Winnipeg (-0.8%) posted the largest declines.
- Vancouver ($193.40) remained the city with the highest average domestic air fare, followed by Toronto ($193.20). For the fourth consecutive year, Saskatoon ($150.10) remained the city with the lowest average domestic air fare. Vancouver, Toronto and Winnipeg remained the only cities with average domestic air fares above the national average ($168.30).

Analysis

Average base air fares[1]

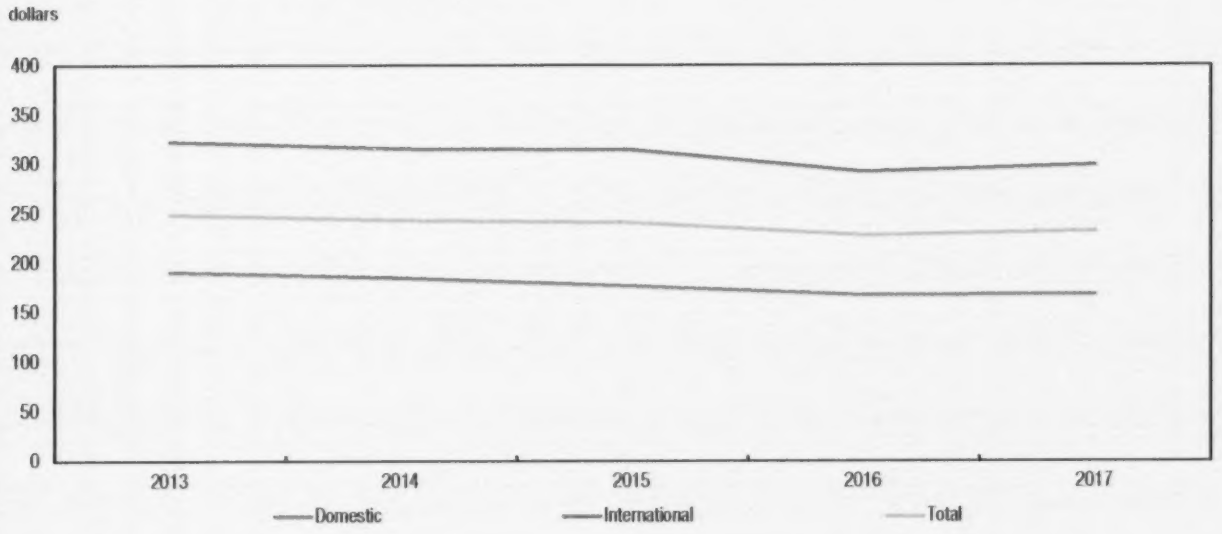
The airline industry continued to see increased demand for air travel in 2017 for the eighth consecutive year following the economic slowdown of 2009. During this period, base air fares in Canada for domestic and international travel combined (on a coupon origin-destination basis) averaged $232.50, up 2.0% from 2016, reversing the downward trend of the previous three years. This increase was a result of year-over-year advances in the last three quarters, with the most notable growth occurring in the second quarter (+6.3%).

The average domestic base fare edged up 0.5% from the previous year to $168.30, reversing the downward trend of the previous four years.

Following three consecutive years of annual declines, the average international base fare rose 2.5% to $299.10, mainly driven by growth in the second quarter (+8.5%).

As shown in Chart 1, the average domestic air fare has steadily declined since 2013 before increasing in 2017; however, it remained below the average fare registered in 2009, the year of the economic slowdown. Though the airline industry continues to be aggressive and competitive in nature, the economic growth in Canada in 2017 and higher jet fuel prices may have translated to higher fares.

Chart 1
Average air fares — All fares, by sector, 2013 to 2017



Source: Statistics Canada, Fare Basis Survey.

In the international sector, the average air fare rose for the first time since 2013 and experienced the largest increase since 2008. Though there was a continued increase and intense competition amongst Canadian and foreign carriers in international markets, and the expansion of low-cost flights in select leisure destinations in the United States, as well as in other international leisure markets where demand is highly elastic and responds positively to lower prices, the growth in international traffic, the boost in the economy and the increase of jet fuel prices are amongst the factors that may have contributed to the growth in the international fares.

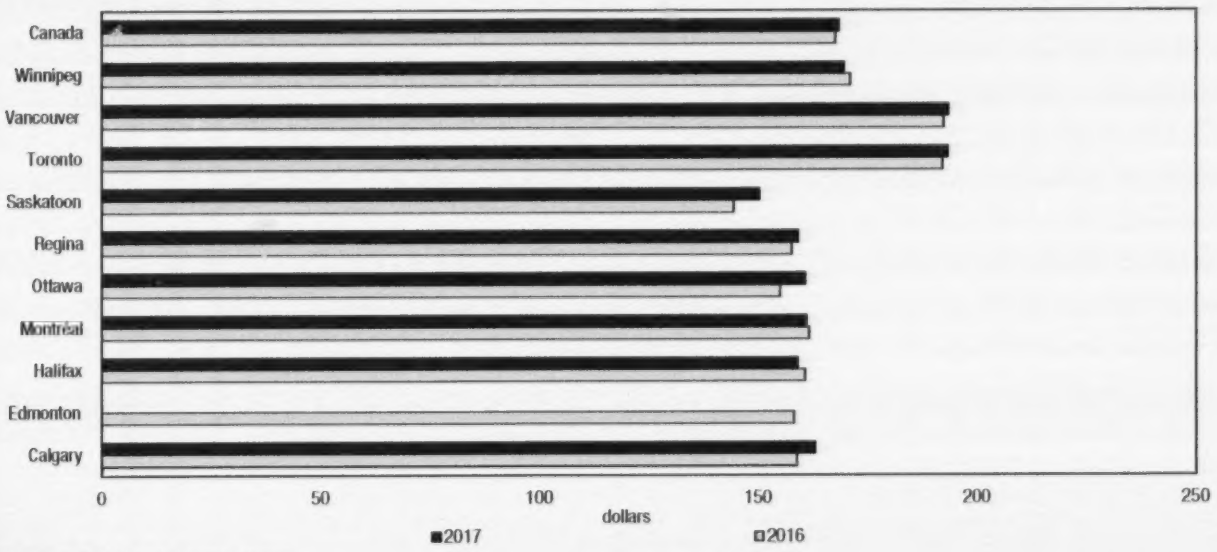
1. Average air fares are calculated for each flight stage. When the passenger boards the aircraft at one airport and departs the aircraft at another airport, this is considered a flight stage. These fares do not include the goods and services tax, air transportation taxes or user fees such as airport fees or fuel surcharges.

Average domestic base air fares at the city level

In 2017, of the 10 selected Canadian cities where passengers boarded the plane, Saskatoon (+4.0%), Ottawa (+3.7%) and Calgary (+2.6%) recorded the largest increases in average domestic air fares, while Halifax (-1.1%) and Winnipeg (-0.8%) posted the largest declines. Vancouver ($193.40) remained the city with the highest average domestic air fare, followed by Toronto ($193.20) and Winnipeg ($169.50). Saskatoon ($150.10) continued to post the lowest average domestic air fare since 2014. Higher fares in Vancouver and Toronto can be partly explained by the fact that more long-haul flights—which are more expensive—leave from Vancouver International Airport and from Toronto's Pearson International Airport.

As shown in Chart 2 below, Toronto was the only selected eastern Canadian city of enplanement to register an average domestic air fare above the national level ($168.30) in 2017. During the same period, Vancouver and Winnipeg were the only selected western Canadian cities of enplanement to register an average fare above the national level.

Chart 2
Average domestic fares for selected eastern and western Canadian cities of enplanement, 2016 and 2017



Source: Statistics Canada, Fare Basis Survey.
Note: The 2017 value for Edmonton was suppressed to meet the confidentiality requirements of the *Statistics Act*.

For historical annual data at the city level, please refer to Table 23-10-0238-01 (formerly: CANSIM 401-0004).

The air fare index is no longer included in this publication as of reference year 2012. However, this data series can be found in Table 18-10-0033-01 (formerly: CANSIM 329-0078).

Notes

The estimates are derived from a sample of flight coupons collected as part of the Fare Basis Survey. The estimates relate to the operations of major Canadian air carriers. For 2017, the air carriers included are the Canadian Level I carriers (Air Canada (including Air Canada rouge beginning in July 2013), Jazz, Air Canada's Canadian regional code-share partners, Air Transat and WestJet).

For purposes of statistical tabulations, fare codes reported by the air carriers are grouped by general fare type. These fare types are defined as follows:

- First class: The transportation of a passenger or passengers for whom premium-quality services (e.g. larger seats, complimentary bar) are provided.
- Business class: A fare level which is less expensive than first class and more expensive than the basic fare level. It includes different amenities (e.g. larger seats, advanced seat assignment).
- Economy: A basic fare level which is less expensive than first class but does not include the amenities (e.g. larger seats, complimentary bar) of the first class fare.
- Discount: A reduced fare usually subject to one or more travel restrictions, the price of which is usually calculated as a percentage reduction from the normal full fare. It includes various discount fares such as charter class, seat sales, advance purchase excursion and group.
- Other: Represents industry and agency discount fares, military as well as unknown fare codes.

The average fare is obtained by dividing the carriers' revenue by the passenger volume, as measured by coupon origin and destination.

The average domestic air fares are the average for all coupons originating in that city, for all domestic destinations. The level of average fares can be affected by changes in travel patterns, as well as prices.

Average air fares are base fares and they do not include the goods and services tax, air transportation taxes or user fees such as airport fees or fuel surcharges.

Additional information on Fare Basis statistics can be obtained directly from the Aviation Statistics Centre. Tables are available in print form or in electronic format. For further information, please call (1-866-500-8400) or e-mail Client Services at STATCAN.TransportationStats-StatistiqueduTransport.STATCAN@canada.ca.

Table 1
Average fares, by sector and fare type group - Canadian air carriers, Level I[1] - Scheduled services

	Fare type group				
	Total	Business class	Economy	Discounted	Other
	dollars				
Domestic					
2013	190.80	2,546.50	277.70[E]	189.00	135.30
2014	184.90	2,736.60	271.80	182.90	147.20
2015	176.70	2,784.50	280.00[E]	174.70	173.80
2016	167.50	2,901.20[E]	282.20[E]	166.00	156.30
2017[p]	168.30	F	297.70	166.40	154.00
Short-haul					
2013	136.40	1,195.70[E]	200.40[E]	134.90	92.50
2014	129.10	1,354.60[E]	191.00	127.70	100.30
2015	118.50	F	189.80[E]	117.10	136.90
2016	111.00	F	185.70[E]	110.00	125.60
2017[p]	114.20	F	201.90	112.70	128.10
Long-haul					
2013	238.50	2,632.30	373.30[E]	236.00	169.10
2014	235.20	2,866.90	364.00[E]	232.40	188.10
2015	228.50	2,814.50	375.00[E]	225.90	204.40
2016	217.70	2,905.20[E]	376.30[E]	215.60	186.00
2017[p]	216.50	F	398.90[E]	214.10	178.50
International					
2013	322.60	4,251.00	464.80[E]	320.60	202.40
2014	315.50	4,412.80[E]	486.10[E]	311.20	205.80
2015	314.40	4,798.80	F	310.30	238.90
2016	291.90	5,483.30[E]	500.00[E]	289.00	113.20
2017[p]	299.10	5,860.60[E]	544.70	295.60	140.60
Domestic and international					
2013	249.00	3,761.40	346.50[E]	247.00	176.30
2014	243.70	3,978.60[E]	361.60[E]	240.70	176.00
2015	241.00	4,384.30	F	238.20	188.90
2016	227.90	5,018.50[E]	383.10[E]	225.80	133.60
2017[p]	232.50	5,418.30[E]	399.30	230.10	148.80

[p] preliminary

[E] use with caution

F too unreliable to be published

1. From 2013 to 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed. All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.

Table 2
Distribution of passengers, by sector and fare type group - Canadian air carriers, Level I[1] - Scheduled services

	Fare type group			
	Business class	Economy	Discounted	Other
	percent			
Domestic				
2013	0	2.2[E]	97.1	0.7
2014	0	2.2	97.1	0.7
2015	0	1.7[E]	97.9	0.4
2016	0[E]	1.2[E]	98.3	0.5
2017[p]	0[E]	1.4	98.0	0.6
Short-haul				
2013	0[E]	2.6[E]	96.8	0.7
2014	0[E]	2.4	96.9	0.7
2015	F	1.9[E]	97.7	0.4
2016	F	1.3[E]	98.2	0.5
2017[p]	0[E]	1.5	97.9	0.6
Long-haul				
2013	0	1.8[E]	97.4	0.7
2014	0	1.9[E]	97.4	0.7
2015	0	1.6[E]	98.0	0.4
2016	0[E]	1.2	98.3	0.5
2017[p]	0[E]	1.3	98.1	0.6
International				
2013	0	1.6[E]	97.0	1.4
2014	0	1.9[E]	97.2	0.8
2015	0	1.4[E]	98.4	0.1
2016	0	1.1[E]	98.3	0.6
2017[p]	0	1.0	98.6	0.4
Domestic and international				
2013	0	1.9[E]	97.1	1.0
2014	0	2.1[E]	97.2	0.7
2015	0	1.6[E]	98.1	0.3
2016	0	1.2[E]	98.3	0.5
2017[p]	0	1.2	98.3	0.5

[p] preliminary

[E] use with caution

1. From 2013 to 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed. All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.

Table 3
Distribution of passenger-kilometres, by sector and fare type group - Canadian air carriers, Level I[1] - Scheduled services

	Fare type group			
	Business class	Economy	Discounted	Other
	percent			
Domestic				
2013	0	1.9[E]	97.3	0.8
2014	0	1.9	97.3	0.7
2015	0	1.6[E]	98.0	0.4
2016	0[E]	1.2	98.3	0.4
2017[p]	0[E]	1.3	98.1	0.6
Short-haul				
2013	F	2.8[E]	96.5	0.7
2014	0[E]	2.7	96.6	0.7
2015	F	2.1[E]	97.5	0.4
2016	F	1.4[E]	98.0	0.6
2017[p]	0[E]	1.7	97.6	0.7
Long-haul				
2013	0	1.7[E]	97.5	0.8
2014	0	1.8[E]	97.5	0.7
2015	0	1.5[E]	98.1	0.4
2016	0[E]	1.2	98.4	0.4
2017[p]	0[E]	1.2	98.2	0.5
International				
2013	0.1	1.2[E]	97.8	1.0
2014	0.1	1.4[E]	98.0	0.5
2015	0.1	1.0[E]	98.8	0.1
2016	0.1	0.8[E]	98.7	0.4
2017[p]	0.1	0.7	99.0	0.3
Domestic and international				
2013	0	1.4[E]	97.7	0.9
2014	0.1	1.6[E]	97.8	0.6
2015	0	1.2[E]	98.6	0.2
2016	0	0.9[E]	98.6	0.4
2017[p]	0	0.9	98.7	0.3

[p] preliminary

[E] use with caution

1. From 2013 to 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed. All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.

Table 4
Average domestic fares for selected cities of enplanement - Canadian air carriers, Level I[1] - Scheduled services

	2016	2017[p]
	dollars	
Calgary	158.80	162.90
Edmonton	158.10	x
Halifax	160.60	158.90
Montréal	161.60	160.90
Ottawa	154.90	160.60
Regina	157.60	159.00
Saskatoon	144.30	150.10
Toronto	192.10	193.20
Vancouver	192.30	193.40
Winnipeg	170.90	169.50

x suppressed to meet the confidentiality requirements of the *Statistics Act*

1. For 2016 and 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.

Table 5
Average fares, by sector and fare type group - Canadian air carriers, Level I[1] - Scheduled services (quarterly)

	Fare type group				
	Total	Business class	Economy	Discounted	Other
	dollars				
Domestic					
2016					
First quarter	166.60	2,834.30[1]	F	165.10	150.00
Second quarter	164.50	F	300.70	163.00	139.50
Third quarter	173.60	2,900.10[1]	308.30	172.10	175.60
Fourth quarter	163.90	2,832.90[1]	262.30[1]	162.00	156.90
2017[p]					
First quarter	163.50	F	267.20[1]	161.70	158.50
Second quarter	167.70	2,810.50[1]	312.50[1]	165.60	157.80
Third quarter	171.40	F	327.40	169.70	156.70
Fourth quarter	169.30	F	286.90[1]	167.40	144.80
Short-haul					
2016					
First quarter	112.20	F	F	111.60	117.40
Second quarter	110.10	F	188.00[1]	109.30	108.40
Third quarter	110.10	F	208.20	108.80	152.70
Fourth quarter	111.80	F	F	110.30	121.30
2017[p]					
First quarter	111.30	F	183.90[1]	109.90	129.60
Second quarter	115.00	2,193.60[1]	211.70[1]	113.40	126.90
Third quarter	112.10	F	221.00	110.70	125.80
Fourth quarter	118.20	F	196.50[1]	116.70	130.00
Long-haul					
2016					
First quarter	223.20	2,834.30[1]	F	221.00	180.20
Second quarter	212.50	F	394.70	210.40	168.50
Third quarter	220.30	2,925.00[1]	392.90	218.60	194.80
Fourth quarter	214.80	2,832.90[1]	358.10[1]	212.40	200.30
2017[p]					
First quarter	219.40	F	370.10[1]	217.10	192.40
Second quarter	213.70	2,861.90[1]	419.60[1]	211.00	184.70
Third quarter	215.00	F	414.40	212.90	180.70
Fourth quarter	219.50	F	388.70[1]	216.90	160.70
International					
2016					
First quarter	279.90	5,120.40[1]	F	275.30	103.50
Second quarter	275.40	5,447.30[1]	473.60[1]	273.40	103.20
Third quarter	323.70	5,772.40[1]	507.40	321.90	135.30
Fourth quarter	282.40	5,555.30[1]	F	278.80	114.80[1]
2017[p]					
First quarter	278.80	F	539.80[1]	273.60	131.60[1]
Second quarter	298.90	5,655.40[1]	533.30[1]	295.60	146.80
Third quarter	326.40	F	571.10	324.60	142.20
Fourth quarter	287.90	F	550.70[1]	283.90	144.60
Domestic and international					
2016					
First quarter	226.00	4,712.00[1]	F	222.80	123.60
Second quarter	217.10	4,916.50[1]	373.30[1]	215.40	120.60
Third quarter	244.20	5,460.70[1]	369.70	242.80	157.90
Fourth quarter	220.70	4,942.10[1]	F	217.90	132.90[1]
2017[p]					
First quarter	224.40	F	418.50[1]	220.70	145.60[1]
Second quarter	230.70	5,275.70[1]	392.20[1]	228.30	154.30
Third quarter	245.10	F	389.30	243.70	151.60
Fourth quarter	227.10	F	388.90[1]	224.30	144.70

Table 5
Average fares, by sector and fare type group - Canadian air carriers, Level I[1] - Scheduled services (quarterly)

	Fare type group				
	Total	Business class	Economy	Discounted	Other
	dollars				
	percentage change from 2016 to 2017				
Domestic					
First quarter	-1.9	F	F	-2.1	5.7
Second quarter	1.9	F	3.9	1.6	13.1
Third quarter	-1.3	F	6.2	-1.4	-10.8
Fourth quarter	3.3	F	9.4	3.3	-7.7
Short-haul					
First quarter	-0.8	F	F	-1.5	10.4
Second quarter	4.5	F	12.6	3.8	17.1
Third quarter	1.8	F	6.1	1.7	-17.6
Fourth quarter	5.7	F	F	5.8	7.2
Long-haul					
First quarter	-1.7	F	F	-1.8	6.8
Second quarter	0.6	F	6.3	0.3	9.6
Third quarter	-2.4	F	5.5	-2.6	-7.2
Fourth quarter	2.2	F	8.5	2.1	-19.8
International					
First quarter	-0.4	F	F	-0.6	27.1
Second quarter	8.5	3.8	12.6	8.1	42.2
Third quarter	0.8	F	12.6	0.8	5.1
Fourth quarter	1.9	F	F	1.8	26.0
Domestic and international					
First quarter	-0.7	F	F	-0.9	17.8
Second quarter	6.3	7.3	5.1	6.0	27.9
Third quarter	0.4	F	5.3	0.4	-4.0
Fourth quarter	2.9	F	F	2.9	8.9

[p] preliminary

[!] use with caution

F too unreliable to be published

1. For 2016 and 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed. All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.

Table 6
Discount fare traffic, by sector - Canadian air carriers, Level I[1] - Scheduled services (quarterly)

	Passengers		Passenger-kilometres	
	2016	2017[p]	2016	2017[p]
	percent			
Domestic				
First quarter	98.1	97.8	98.1	98.0
Second quarter	98.5	98.1	98.5	98.2
Third quarter	98.5	98.3	98.6	98.4
Fourth quarter	97.9	97.7	98.1	97.8
Short-haul				
First quarter	98.3	97.7	98.1	97.4
Second quarter	98.5	97.9	98.4	97.7
Third quarter	98.4	98.2	98.2	98.0
Fourth quarter	97.6	97.5	97.3	97.2
Long-haul				
First quarter	98.0	98.0	98.1	98.1
Second quarter	98.5	98.2	98.5	98.3
Third quarter	98.6	98.4	98.6	98.4
Fourth quarter	98.1	97.8	98.2	97.9
International				
First quarter	97.7	97.7	98.1	98.2
Second quarter	98.6	98.8	99.0	99.2
Third quarter	99.1	99.2	99.4	99.5
Fourth quarter	97.6	98.4	98.2	98.8
Domestic and international				
First quarter	97.9	97.8	98.1	98.1
Second quarter	98.5	98.4	98.8	98.9
Third quarter	98.8	98.7	99.2	99.2
Fourth quarter	97.8	98.0	98.2	98.5

[p] preliminary

1. For 2016 and 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey

Table 7
Average domestic fares for selected cities of enplanement - Canadian air carriers, Level I[1] - Scheduled services (quarterly)

	Calgary	Edmonton	Halifax	Montréal	Ottawa	Regina	Saskatoon	Toronto	Vancouver	Winnipeg
	dollars									
2016										
First quarter	154.40	154.80	162.40	163.60	156.80	148.60	137.20	195.40	191.20	173.50
Second quarter	150.60	154.40	153.80	163.60	156.20	152.10	139.00	190.30	189.20	167.40
Third quarter	170.50	x	171.60	159.70	156.10	165.40	151.70	192.90	202.50	165.80
Fourth quarter	156.60	x	151.90	159.20	150.50	162.10	147.50	189.80	183.50	178.20
2017[p]										
First quarter	154.70	148.20	153.20	158.60	145.40	148.00	135.30	193.60	189.10	170.90
Second quarter	161.70	x	152.70	160.70	160.80	164.70	151.50	191.40	194.50	169.20
Third quarter	169.30	x	169.70	158.30	164.60	162.20	160.00	192.20	196.90	167.00
Fourth quarter	163.80	x	156.00	166.20	169.40	159.00	150.20	196.10	191.80	171.70
	percent change from 2016 to 2017									
First quarter	0.2	-4.3	-5.7	-3.1	-7.3	-0.4	-1.4	-0.9	-1.1	-1.5
Second quarter	7.4	x	-0.7	-1.8	2.9	8.3	9.0	0.6	2.8	1.1
Third quarter	-0.7	x	-1.1	-0.9	5.4	-1.9	5.5	-0.4	-2.8	0.7
Fourth quarter	4.6	x	2.7	4.4	12.6	-1.9	1.8	3.3	4.5	-3.6

[p] preliminary

x suppressed to meet the confidentiality requirements of the *Statistics Act*

1. For 2016 and 2017, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada - including Air Canada rouge beginning July 2013, Jazz and regional code-share partners), Air Transat and WestJet.

Notes: All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Source: Statistics Canada, Fare Basis Survey.